1.0 Customer Relationship Management – Call Center Quick Hits 3
- 1.1 Options For Spanish Callers “Up-Front” 5
- 1.2 “Warm Handoffs” Between Call Centers 6
- 1.3 Uniform Referral Guide for Call Center Representatives 7
- 1.4 Call Tracking Process 8
- 1.5 Internal Training for Customer Service Representatives 9
- 1.6 Streamline Security Access Processes 10
- 1.7 Consistent All-Inclusive Call Center Meetings 11
- 1.8 Impact on the Modernization Principles 12

2.0 Quick Hits Team Participants and Meeting Schedule 13
- 2.1 Quick Hits Participants 13
- 2.2 Quick Hit Sub-Team Meeting Schedule 13

3.0 Action Plan for Warm Handoffs 14
- 3.1 Definition of a Warm Handoff 14
- 3.2 Technology Requirements and Implementation Process 14
- 3.3 Training 15
- 3.4 Quality Control 15
- 3.5 Additional Implementations 15
- 3.6 Contracts 16
- 3.7 EDS Warm Handoff Training Information 17
- 3.8 AFSA Warm Handoff Training Information 19

4.0 Options for Spanish Callers “Up-Front” 21
- 4.1 Beginning State Call Center Survey Information 21
- 4.2 Letter to Request Changes to the Spanish Option 22

5.0 Action Plan for the Call Center Referral Guide 25
- 5.1 Purpose of the Referral Guide 25
- 5.2 Ownership of the Referral Guide 25

5.3 Printing and Distribution 26
5.4 Updates 26
5.5 Future Format Improvements 26
5.6 Content and Formatted Pages of Referral Guide First Draft 26

1.0 Customer Relationship Management – Call Center Quick Hits

Customers expect and demand consistent, quality experiences independent of the type of inquiry, interaction method, medium or time of day. Customers can and will take their business to someone who understands and can meet their expectations. Therefore, in today's competitive business environment, companies may only have one opportunity to do the job right. Customers demand personal service that makes doing business easy.

Through the use of Customer Relationship Management (CRM), SFA can help students optimize the value of their interactions with the department. This requires us to integrate multiple interaction channels and provide consistent, personalized assistance. By doing this, SFA will increase overall satisfaction, lower unit costs, and improve customer service.

The Customer Relationship Management/Call Center IPT has been created to address the issues involved with providing better customer service through CRM at SFA. The purpose of the IPT is to address the following issues:

- Improve customer satisfaction
- Reduce unit costs
- Develop better customer relationship management in a timely way through the medium that best meets their needs, i.e. phone, web, paper
- Promote electronic business while maintaining easy access to paper

To attain these goals as quickly as possible, the IPT has decided to implement some immediately attainable "Quick Hits". The team's research and analysis has revealed the opportunities as summarized in Table 1-1.

Table 1-1 Quick Hits Recommendations

Quick Hits Options	Final IPT Recommendation
Options for Spanish Callers "Up-Front"	• Pursue During Fiscal Year 2000
"Warm Handoffs" Between Call Centers	• Pursue at 3 major Call Centers in Fiscal Year 2000 • Create an Action Plan for the Remaining Call Centers in Phase II
Uniform Referral Guide for Call Center Representatives	• Develop a paper based Referral Guide for distribution • Implement phased training to be conducted by each call center • Desktop software referral guide scheduled for Phase II
Call Tracking Process	• Phase II
Internal Training for Customer Service Representatives	• Investigate further for possibility of future implementation
Streamline Security Access Processes	• Phase II
Consistent All-Inclusive Call Center Meetings	• Phase II

In order to determine the solutions that should be implemented immediately, the IPT developed a list of criteria to prioritize the opportunities. These solutions needed to address the Modernization principles of improving customer satisfaction, improving employee satisfaction, and reducing unit costs. The following is a list of the criteria used to decide the practicality of the solutions.

The solution must:

- Be implemented by the end of fiscal year 2000
- Involve a simple implementation process
- Not be restricted by contracts
- Influence all areas of the organization
- Increase customer and employee interaction

1.1 Options For Spanish Callers "Up-Front"

Reaching out to all customers is an important part of SFA's mission of "Sending America through School". As the number of Spanish speaking customers continues to grow, SFA will have to address this customer base with specifically tailored messages. Currently, contact by a Spanish speaking customer is handled inconsistently across the Call Centers. Some centers do not provide greetings in Spanish, others offer the option to hear the call tree menu in Spanish at the end of the English messages, and many Call Centers do not address the Spanish customer population at all. This inconsistent service at the opening the automated answering systems has the Spanish customers abandoning calls at very high rates. These trends have negatively impacted SFA's ability to adequately serve all customers.

Business Problem:	• Spanish option not available • Spanish option not at front of VRU menu • Spanish option spoken in English • Lose Spanish speaking customers
Potential Solutions:	• Create Spanish option • Move Spanish option to front of VRU • Speak the Spanish option in Spanish • Provide a consistent and pleasant experience for Spanish speaking customers across all Call Centers • Enhance VRU with Spanish selection tree • Support Spanish customers with Spanish Customer Service Representatives
Benefits:	• Reduce the complexity of the Direct Loan Program's systems infrastructure • Reduce costs • Remove duplicate functionality in the Direct Loan systems • Reduce number of interfaces, system maintenance requirements, balancing, and reconciling • Provide for more consistent data between servicing systems
Risk:	• Confusion for non-Spanish speaking customers • Increased complexity
Potential Costs	• Less than $500,000
Call Centers Affected:	• All Call Centers
Final IPT Recommendation:	• Pursue During Fiscal Year 2000

1.2 “Warm Handoffs” Between Call Centers

Customers now expect to obtain information with as little effort as possible. Often, complex questions may require the unique skills of many centers in order to be resolved. These types of calls are usually referred multiple times between the different Call Centers. In other cases, customers call the wrong phone number and need to be directed to the correct Call Center. Warm handoffs provide the capability to transfer a customer to the correct Call Center and introduce the customer’s information and issues to the receiving Customer Service Representative (CSR). This service helps personalize and improve the service a customer receives.

Business Problem:	• Inability to transfer customers between Call Centers • Frustration for customers • Increased costs
Potential Solutions:	• Build technical infrastructure between Call Centers to support hand-offs • Develop Procedure and Referral guides • Implement vendor software to provide intercept capability
Benefits:	• Increased customer satisfaction • Reduced costs • Increased productivity • Streamlined process • Greater first call resolution
Risk:	• Creates a learning curve for CSR’s • Training – uniform implementation across all call centers • Increased costs (infrastructure/support) • Increased talk time for initial calls when two operators are involved • Increased resource needs to implement
Potential Costs	• $3 million
Call Centers Affected:	• Phase I • Direct Loan Servicing • Direct Loan Consolidation • Direct Loan Origination • Phase II • Remaining Call Centers
Final IPT Recommendation:	• Pursue at 3 Call Centers in Fiscal Year 2000 • Create an Action Plan for the Remaining Call Centers

1.3 Uniform Referral Guide for Call Center Representatives

In a multiple Call Center environment, it is vital to be able to refer customers to the correct Call Center when necessary. Currently, there is confusion over each Call Center's responsibilities, contact information, and availability. This contributes to poor customer service by providing misinformation and incorrect referrals. By compiling information on all the available Call Centers in a Referral Guide, Customer Service Representatives (CSR) will be able to direct customers to the appropriate Call Center. Detailed information on the Call Centers will also help the CSRs and customers find the best method to contact each center.

Business Problem:	• Referrals inaccurate/inconsistent • Customer frustration due to inconsistent information • Training inconsistent among call centers
Potential Solutions:	• Develop paper-based guide • Develop electronic CD-based tool • Develop Internet-based tool
Benefits:	• Increased customer satisfaction • Increased employee satisfaction • Increased consistency
Risk:	• Maintaining accurate info • Installation and support • Training resources
Potential Costs	• Less than $100,000
Call Centers Affected	• All
Final IPT Recommendation:	• Develop a paper based Referral Guide for distribution • Implement phased training to be conducted by each call center

1.4 Call Tracking Process

Having a complete view of the customer’s contact history helps in providing better service. Tracking customer calls provides many advantages. Some of these include:

- following a customer’s call to closure
- capturing answers and building knowledge capital
- providing a source for training information
- identifying the most effective methods of customer contact

Call tracking can increase a customer’s satisfaction simply by eliminating the need for each contact to start over at the beginning of the issue.

Business Problem:	• Call Centers do not currently view customer relationship • No customer transaction history • Lack of follow through on customer inquiry
Potential Solutions:	• Implement COTS tracking solution
Benefits:	• Increased customer satisfaction • Decreased costs • Contact history • Issue resolution
Risk:	• Disruption in production • Multiple platforms at vendor locations • Coordination of implementation
Potential Costs	• $ 5 million
Call Centers Affected:	• All major Call Centers with the potential to affect all centers
Final IPT Recommendation:	• Consider in a later phase

1.5 Internal Training for Customer Service Representatives

Consistent training of Customer Service Representatives will assist in providing customers a common experience when contacting SFA. Developing training internally helps to ensure that the messages given to CSR’s are consistent and the goals of “Sending America through School” are met. Training plans can be distributed to the Call Centers to support consistent quality of customer service at SFA.

Business Problem:	• Inconsistent training across call centers • Quality of training is difficult to monitor
Potential Solutions:	• Develop common framework for SFA Customer Service Representative curriculums
Benefits:	• Common messages to Customer Service Representatives • Common messages to customers • Consistent service • Improved customer satisfaction
Risk:	• Contracting changes/modifications • Scope training effort
Potential Costs	• $1.2 million
Call Centers Affected:	• All
Final IPT Recommendation:	• Investigate further for possibility of future implementation

1.6 Streamline Security Access Processes

Currently, requests for access to the systems needed to conduct business for our customers can take months to be approved. This delay can be very costly in the terms of losing work time, increasing demand on employees with clearance, and causing work to be redone. Reviewing the processes that have been developed on an ad hoc basis can reveal opportunities to streamline the overall process. An efficient process will save time and money while increasing employee and customer satisfaction.

Business Problem:	• Multiple service personnel using multiple systems for the same purpose • Duplicate data in multiple locations • Inconsistent customer service • Inefficient Processes • Unnecessary cost
Potential Solutions:	• Design or select one vendor package for all service personnel
Benefits:	• Reduce system complexity • Provide for efficiencies of scale • Lower support and maintenance costs • Provide for more control of quality • Provide more consistent data, processes, and service • Implement industry best practices
Risk:	• Interruption in production during data migration and system integration • Potential data inconsistencies • Impact to training, communication, and coordination
Potential Costs	• Less than $15,000
Call Centers Affected:	• All
Final IPT Recommendation	• Consider in a later phase

1.7 Consistent All-Inclusive Call Center Meetings

Communication among the vendors can offer many opportunities to improve the overall service provided by SFA Call Centers. Improved processes, common issues, and success stories can all be shared in an open forum that crosses the traditional barriers created by the multiple vendor Call Center environment.

Business Problem:	• Lack of communication among vendors • Lack of communication among Customer Service Representatives
Potential Solutions:	• Organize a Call Center leaders meeting to be held on a regular basis (i.e. weekly, monthly, quarterly) • Organize a Call Center meeting that involves CSR's on a regular basis
Benefits:	• Faster process improvement • Issue resolution • Foster a sense of community
Risk:	• Contracts may need to be altered • Vendor issues with sharing proprietary information • Getting commitment from the diverse community
Potential Costs	• Less than $10,000
Call Centers Affected:	• All
Final IPT Recommendation	• Investigate for possible implementation after CRM Call Center IPT is completed

1.8 Impact on the Modernization Principles

The opportunities to reengineer system interfaces and processes within SFA offer the chance to significantly reduce costs and improve customer satisfaction while beginning to improve employee satisfaction. These opportunities also present the ability to implement industry best practices at SFA. The level of impact on each principle is shown in Figure 1-8.

	SFA Modernization Principle		
Opportunity	**Reduce Costs**	**Improve Customer Satisfaction**	**Improve Employee Satisfaction**
Options for Spanish Callers "Up-Front"	○	●	◐
"Warm Hand-Offs" Between Call Centers	◐	●	●
Uniform Referral Guides For All Call Center Representatives	◐	◐	●
Call Tracking Process	◐	◐	◐
Internal Training For Customer Service Representatives (SFA University)	○	◐	◐
Streamline Security Access Processes	◐	○	◐
Consistent All-Inclusive Call Center Meetings	○	○	◐

● **= High Impact** ◐ **= Medium Impact** ○ **= Low Impact**

Figure 1-8 Impact on SFA Modernization Principles

2.0 Quick Hits Team Participants and Meeting Schedule

2.1 Quick Hits Participants

Sandy Whitmire	Students
Kelli Callari	AFSA
Sue Szabo	AFSA
Bernardette Herbert	CFO
Jarvis Davis	EDS
Chris Ledman	NCS
Jacqueline Wyndham	NCS
Barbara Mason	Schools
Wayne Booth	Schools
Ben Leborys	Students
Cathy Power	Students
Daria Adams	Students
Maria Carmona	Students
Monica Menard	Students
Sherlene McIntosh	Students
Yvonne Somerville	Students

2.2 Quick Hit Sub-Team Meeting Schedule

6/7/2000	2:00
6/14/2000	9:00
6/21/2000	2:00
6/28/1000	2:00
7/12/2000	2:00
7/19/2000	2:00
7/26/2000	2:00
8/2/2000	3:00
8/9/2000	10:00
8/16/2000	2:00
8/23/2000	2:00
9/6/2000	2:00
9/13/2000	10:00
9/20/2000	2:00
9/28/2000	2:00

3.0 Action Plan for Warm Handoffs

Warm handoffs are being conducted between Direct Loan Servicing, Loan Origination, and Loan Consolidation as a result of the work done by the CRM Call Center IPT's Quick Hits team. In fiscal year 2001, SFA should work to implement warm handoffs between additional call centers. Completing this work will require the actions and information detailed in this document.

3.1 Definition of a Warm Handoff

The Quick Hits team defined a warm handoff as:

> the capability of forwarding or transferring Department of Education customers to the contractor that will address their needs or concerns.
>
> As the Department of Education Representative (the initiator), you would:
>
> 1. Dial the special or 800 number to the other special or 800 number.
> 2. Inform the representative at the special number that the customer is holding.
> 3. Stay on the line until you explain the customer's concern or need to the receiving representative.
> 4. Introduce the customer to the representative.
> 5. Drop off the line after you are sure the representative can assist your customer.
>
> In some instances, you may need to make more than one call to special lines in the event the number you call first cannot service your customer's needs.

3.2 Technology Requirements and Implementation Process

The work conducted by the Quick Hits Team determined that certain requirements would need to be met by the telephone services provider to properly conduct warm handoffs. Some of these findings are listed here:

SFA contracted with MCI to provide services for the FTS 2001 lines. Following is a process description of what was needed in order to perform the warm handoffs.

- The contractors for SFA assisted MCI with the migration from AT&T.
- There was a 4-week lead-time provided to MCI with the request and specifications of what was needed in order to perform the warm handoffs.
- No additional lines were ordered to accommodate this process.
- MCI used one week to test the procedures.
- The SFA contractors used two weeks to test the procedures once MCI completed their test.
- There was a 48-hour window after the migration to test and approve everything by the contractors of SFA before reverting back to AT&T if problems were detected.

3.3 Training

Training is an important aspect to providing a consistent experience for a customer who needs to be transferred. The training programs used for the Quick Hits Team's implementation are included at the end of this document.

3.4 Quality Control

On-site and remote call monitoring should be used to ensure that warm handoffs are being conducted according to the standards established by the Quick Hits sub team. Additional measures should be taken to track the quantity of warm handoffs and the number of warm handoffs that are not necessary.

3.5 Additional Implementations

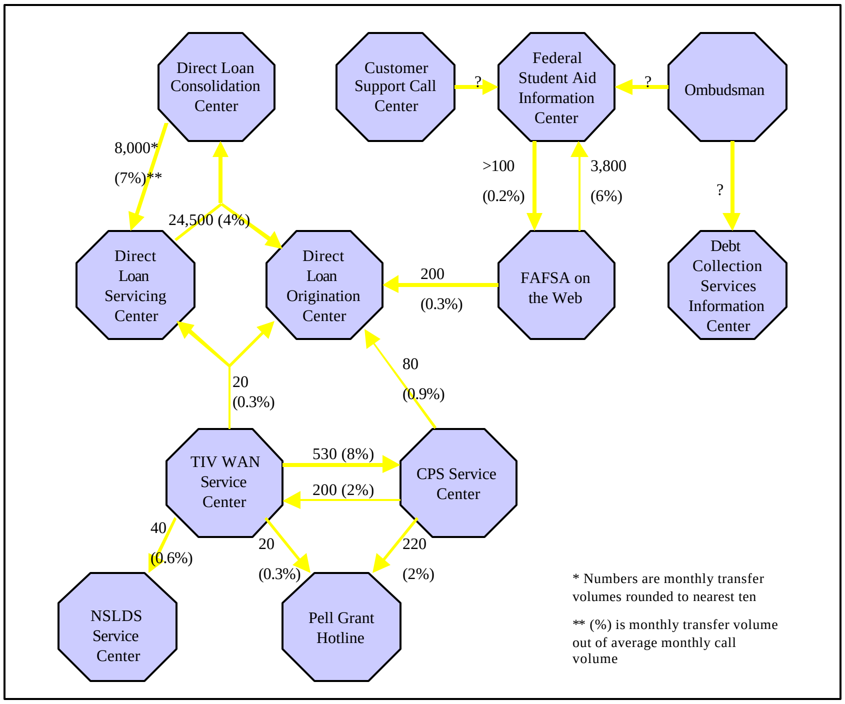
Thirteen call centers were analyzed by the CRM Call Center IPT. Warm handoffs were implemented between three centers. The remaining ten centers are:

- NSLDS
- Default Management
- FAFSA on the Web
- CPS
- TIV WAN
- Federal Student Aid Information Center
- Debt Collection Services Information Center
- Pell Grant Hotline
- Ombudsman
- Customer Support Call Center

The following figure provides a detailed picture of the transfer information provided by the Current State Analysis surveys. The figure shows:

- Call centers
- Transfer interaction between centers
- Volume of transfers for each center on a monthly basis
- Percent of the average monthly call volume that the transfers represent for each center

This information can be used to determine the next call centers for implementing warm handoffs. A re-evaluation of the data will be needed as the warm handoffs are implemented and other tools, which may effect transfers, become available to the call centers.


Direct Loan Consolidation Center
Customer Support Call Center
?
Federal Student Aid Information Center
?
Ombudsman
8,000*
(7%)**
24,500 (4%)
>100
(0.2%)
3,800
(6%)
?
Direct Loan Servicing Center
Direct Loan Origination Center
200
(0.3%)
FAFSA on the Web
Debt Collection Services Information Center
80
(0.9%)
20
(0.3%)
TIV WAN Service Center
530 (8%)
200 (2%)
CPS Service Center
40
(0.6%)
20
(0.3%)
220
(2%)
NSLDS Service Center
Pell Grant Hotline

* Numbers are monthly transfer volumes rounded to nearest ten

** (%) is monthly transfer volume out of average monthly call volume

Figure 3-1 Call Center Transfer Current Environment

3.6 Contracts

Existing operating contracts will be affected by the implementation of warm handoffs. There are potential impacts on call center service levels as call volumes change and queue management capabilities are tested as a result of this new feature. Contracts also place requirements on call centers which may affect the amount of transfers conducted. If these contractual requirements are altered, the following are possible changes to anticipate:

- Average speed to answer may change
- Volume of transfers may increase

3.7 EDS Warm Handoff Training Information

LOAN CONSOLIDATION & ORIGINATION
TRAINING for WARM HANDOFFS

I. Introduction

The purpose of this training is to provide an overview of what warm handoffs are and what procedures Loan Consolidation and Loan Origination CSRs will follow in handling this capability.

This is a form of conferencing where all three people can remain on the phone at once, and talk to each other.

II. Training Topics

In this training participants will be provided with :

- The definition of warm handoffs
- A copy of manual procedures
- The codes and scripts for each service and support center
- Role plays to review and discuss

IV. Objectives

With these tools, the CSR's will:

- Understand the definition of a warm handoff
- Identify the codes necessary to handoff the caller
- Describe how to properly handoff calls to other service and support centers

---

Note:

- **The training is contingent upon the Migration from AT&T to MCI taking place.**

- **The training sessions will last 30 minutes in length for each group**

The training will be conducted for:

- Loan Origination Center – Montgomery, AL
  Total of 95 people = 8 teams (12 people per session / 3 days)

- Loan Consolidation Center – Montgomery, AL
  Total of 80 people = 4 teams (20 people per session / 1.5 days)

- Loan Consolidation Center – Louisville, Kentucky
  Total of 50 people = 3 teams (16 people per session / 1 day)

3.8 AFSA Warm Handoff Training Information

Telephone Etiquette
Warm Transfers from the Servicing to Loan Origination

Action to be taken	Response
Advise the caller:	*"Unfortunately I do not have access to that information for you. I can connect you with the Loan Origination Center who will be able to assist you. For future reference, you can reach the Loan Origination Center directly at 1-800-848-0978. Let me try that line for you now"*
• Dial T1 (*****82) • **Pause for 5 seconds** • **Press *7** This will speed dial the Application Services number at the LOC for you.	**The caller will still be on the line**. • Do not place the caller on hold • Do not place the caller on transfer • The caller will be on the line when you dial
Tell the caller:	"Thank you for holding Mr./Ms. ______. We are being connected with the Loan Origination Center now. Please stay on the line until I have connected you with a representative."
You will be connected to the LOC's VRU: • **Press 1 for on English speaking representative** • **Press 2 for a Spanish-speaking representative** • **Press "8" to be routed to the front of the queue as a Priority call.** Note: **Do not give this priority number out to any callers. You will stay in queue until a representative answers the call.**	
When a representative answers the call:	"Good morning/afternoon/evening. This is (your name) from the Direct Loan Servicing Center. I have (caller's name) on the line with us. The social security number they are calling about is ___-__-____. They are calling about (state the issue). Go ahead Mr./Ms. (caller's name).

Press the "Release" button on your phone. The caller and the LOC will be connected.	
If you get a busy signal:	**Tell the caller:** "I'm sorry, the line is busy. Let me give you the 800 number again and you may try them at your convenience. Do you have a pen and paper handy? The number is 1-800-848-0978. Their hours are from 8:00 a.m. to 8:00 p.m. Central Time. Thank you for calling."

4.0 Options for Spanish Callers “Up-Front”

The Quick Hits sub team accomplished the changes to the automated answering services at the call centers by using the following three steps:

1. Survey the call centers for current method of addressing Spanish speaking customers
2. Deliver a letter to the call center managers and COTRs requesting the appropriate changes to the automated answering system
3. Survey the call centers again to determine if the appropriate changes were made to the automated answering system and the plan for making changes if the goal had not been reached by September 30, 2000

4.1 Beginning State Call Center Survey Information

Call Center	**Phone Number**	**Spanish Speaking Agents**	**Spanish Option Up-Front**
CPS Customer Service Center	800-330-5947	Yes	No
Customer Support Call Center	800-433-7327	Yes	No
Debt Collection Services Information Center	800-621-3115	Yes	No
Direct Loan Consolidation Center	800-557-7392	Yes	No
Direct Loan Origination Center	800-848-0978	Yes	No
Direct Loan Servicing Center	800-848-0979	Yes	Yes
FAFSA on the Web Customer Service Center	800-801-0576	Yes	No
Federal Student Aid Information Center	800-4FED-AID	Yes	Yes
Default Management Division	202-401-7482	No	No
NSLDS Service Center	800-999-8219	Yes	Yes
Ombudsman	877-557-2575	Yes	No
Pell Grant Hotline	800-474-7268	No	No
Title IV WAN	800-615-1189	Yes	No

4.2 Letter to Request Changes to the Spanish Option

The following text is the letter sent out to the call centers requesting that the appropriate changes be made to the automated answering systems.

09/18/2000

To: Milidantri, Michaelyn
Haynes, Fred
Hilton, John
Beavers, Rosemary
Fowler, Sandra
Wiley, Debra
Domergue, Christopher
Figgins, Michael
Szabo, Sue
Westbrook, Mary
Hopkins, Gary
Wingard, Steve
O'Riley, Carl
DeMoss, Joyce
Phillips, James
Murray, Michael
Hayward, Dan
Bates, Dena
McIntosh, Sherlene
Harding, Nettie
Sefton, Karen
Wilson, Keith
Whitmire, Sandra
Leifeste, Denise
Anderson, Barbara
Stone, Shelby
Reynolds, Nancy
Alexander, Lynn
Ramos, Frank
Brooks, Yolanda
Kinfu, Michael

Subject: Spanish Options at Call Centers

The Customer Relationship Management IPT is focused on developing methods to interact with SFA customers more effectively through the call centers. One piece of the call centers which can be changed relatively quickly with a major impact on customer satisfaction is the means of addressing Spanish speaking customers. Many SFA customers speak Spanish as a native language. SFA can increase the satisfaction of these customers by making the Spanish ption at the call centers more accessible.

The IPT's research has shown that there are many different methods of addressing Spanish speaking customers within SFA. Many call centers offer the option to continue in Spanish after offering all the options in English. Some call centers speak in English when offering the option to continue in Spanish. The current practices do not optimize the service offered to the Spanish speaking customers. The IPT is asking each call center to begin its automated answering with the option to continue in Spanish. The intention is to include the Spanish option in the first two or three sentences of the introductory answer. For example, when the automated answering system picks up a customer's call, the customer would hear:

1. You have reached the ABC Customer Interaction Center.
2. To continue in English, press 1.
3. Para seguir en espanol, marque el dos (translation - to continue in Spanish, press 2).

While there will be several unique issues in order to institute this initiative, each call center should keep in mind the intentions of the effort. The goal is for the Spanish speaking customers to hear the option to continue in the Spanish language during the first few moments of the contact. The IPT requests that the changes be completed by September 29, 2000. If there are any questions regarding the request, please contact Dena Bates. Dena can be reached at (202) 708-7115 or via email at dena_bates@ed.gov.

The IPT thanks each of you for helping to provide better service to our customers. We especially want to thank the people at the call centers who have taken the initiative to make changes that address this issue already.

Jeanne Van Vlandren
General Manager for Students

4.3 End state Spanish Option at the Call Centers

Call Center	**Phone Number**	**Spanish Speaking Agents**	**Spanish Option Up-Front**
CPS Customer Service Center	800-330-5947	Yes	Yes
Customer Support Call Center	800-433-7327	Yes	Yes
Debt Collection Services Information Center	800-621-3115	Yes	Yes
Direct Loan Consolidation Center	800-557-7392	Yes	No
Direct Loan Origination Center	800-848-0978	Yes	No
Direct Loan Servicing Center	800-848-0979	Yes	Yes
FAFSA on the Web Customer Service Center	800-801-0576	Yes	Yes
Federal Student Aid Information Center	800-4FED-AID	Yes	Yes
Default Management Division	202-401-7482	No	N / A
NSLDS Service Center	800-999-8219	Yes	Yes
Ombudsman	877-557-2575	Yes	Yes
Pell Grant Hotline	800-474-7268	No	N / A
Title IV WAN	800-615-1189	Yes	Yes

5.0 Action Plan for the Call Center Referral Guide

A referral guide was created by the CRM Call Center IPT Quick Hits sub team to benefit the Customer Service Representatives (CSRs) and SFA front-line employees. The Referral Guide has been formatted to be printed and used as a stand-up binder. The individual pages are included as an attachment. The Referral Guide is intended to represent the purpose of the call centers and should be updated as information changes.

5.1 Purpose of the Referral Guide

The Referral Guide is intended to provide customer facing representatives of SFA a quick way to refer customers to the proper call center for solutions to their issues. To accomplish this purpose, the Referral Guide is divided into four sections.

Section I. – Call Center Listing
Section II. – School Inquiries Information Matrix
Section III. – Borrowers / Students Inquiries Information Matrix
Section IV. – Individual Call Center Detail Pages

Section I provides a one page list of the 12 call centers which includes the name and phone numbers for each center.

Section II provides a one page matrix of issues and call centers which involve the inquiries which are made by schools.

Section III provides a one page matrix of issues and call centers which involve the inquiries which are made by borrowers and students.

Section IV provides individual pages of information on each call center. The contents of each page include:

- Call Center Title
- Hours of Operation
- Phone Number(s)
- Email address
- Website
- Fax
- Purpose
- Primary Customers
- Services Offered

5.2 Ownership of the Referral Guide

The Referral Guide was developed by a team which was temporarily established for this accomplishment. Updating and improving the Referral Guide requires permanent ownership within SFA. It is the recommendation of the team to have the Customer Service Call Center Support group maintain this ownership.

The responsibilities of owning the Referral Guide will include printing, distribution, updates, and improvements to the format.

5.3 Printing and Distribution

The printing process for the Students Channel is conducted by the Customer Service Call Center Support group. The team anticipates that the Referral Guide will follow the same process used for other publications. Distribution to the call centers should be received by a designated person at each center. The team recommends getting the designated resource for each center through the COTR.

5.4 Updates

Information updates will be affected by the format of the Referral Guide in its final printing. Three ring binders can be updated more frequently at lower costs. Spiral binding would mean that complete reprints would be necessary to complete updates; stickers could be used for interim updates in this case. If the Referral Guide is published electronically, then updates would be more simple and efficient to complete at a higher frequency than hard copies. Updates through the intranet/internet could be made monthly by submitting the changes to the responsible content manager. Updates to printed copies cannot be done as frequently. The team recommends that these updates take place once every four months or when major changes happen within the call center community.

5.5 Future Format Improvements

The number one recommendation for improving the format is to provide the content electronically. The options for this recommendation include:

- providing an Acrobat Reader file (*.pdf) of the hard copy content
- placing the content online via the intranet
- placing the content online via the internet

5.6 Content and Formatted Pages of Referral Guide First Draft

The following pages are the printed version of the Referral Guide First Draft. These pages are not prepared to fit into a bound format with tabs in the same format as the actual Referral Guide.